

Using Filing Agents

INTRODUCTION - Attorneys and trustees can now create special logins for employees who file on behalf of them in ECF. These user types will have their own login and password. A filing agent may be linked to multiple attorneys and trustees and attorneys and trustees may have multiple filing agents.

Only the attorneys' or trustees' names will appear on the docket report, queries and other case management reports. The filing agents' name will never appear to the public.

The access permissions available to the filing agent are dependent on the permissions of the attorney or trustee for whom the filing agent is docketing. The court controls the permissions available to the attorney or trustee; however, the attorney or trustee controls the filing agent's ability to make fee payments on their behalf. Filing agents cannot have more permissions than the attorney or trustee.

The filing agent may receive email, but only if the attorney or trustee places the filing agent's email address in the "Send notices to these additional addresses" section in the attorney or trustee's email record of their User Account.

Attorneys and trustees have the ability to create and maintain their own filing agents. The creation or editing of a filing agent record is accomplished through an attorney or trustee's person record in the Maintain Your ECF Account utility.

CREATING A FILING AGENT

STEP 1. Access your person record using **Utilities/ Maintain Your ECF Account**. Click **More user information**.

STEP 2. Search for an existing filing agent name by inserting the name of the filing agent in the text box immediately next to "Find filing agent." Click the **search icon**.

- ☐ This search generates a panel listing all filing agents that match your search criteria.
- ☐ If the correct filing agent is found, click **Select** to associate this filing agent with the attorney.

- ☐ If the filing agent you wish to add does not appear on the list, a window will display indicating that the filing agent was not found. Click on **Create a new filing agent** hyperlink at the bottom of the window.
- ☐ A “Filing Agent Information” window will display.
- ☐ Enter the login name and password to be assigned to the filing agent. For the login name, use the last name and first initial. The password must be at least 8 characters with upper- and lower-case alphabetic characters and at least one digit or special character [e.g., @, #, \$, %, *, +].
- ☐ Enter the filing agent’s name, address, and telephone number. Ignore all other fields.
- ☐ Be sure to click the **Submit** button at the bottom of the window to ensure that the data is saved.
- ☐ You will be returned to the More User Information screen. Click **OK** on the pop up. Click **Return to Account screen** and click **Submit** on the Maintain User Account screen.

NOTE: You must make all these selections to create the filing agent.

- STEP 3.** Determine if you want the filing agent to have permission to pay fees on your behalf. If so, the filing agent will need access to an authorized credit card number to use with Pay.Gov. If not, no action needs to be taken.

NOTE: The filing agent cannot make this setting on his or her own. It must be made through the attorney or trustee user account. It can be changed at any time after the filing agent account is activated.

- ☐ If you want the filing agent to pay fees on your behalf, return to **Utilities/Maintain Your ECF Account** and click **More user information** on your address screen.
- ☐ The screen will display filing agents associated with you. The filing agent’s name will display as a hyperlink. Click the hyperlink.
- ☐ A screen will display with the filing agent information. Click **Update permissions**.
- ☐ The permissions screen will display. Change **Internet Payment** options from N to Y. Click **Return to account screen**.

- ☐ Click **Submit** on the filing agent information screen. A message will display. Click **OK**.
- ☐ Click **Return to Account screen** from the More User Information screen. Click **Submit** on the Maintain User Account screen. Click **Submit** again.

DEACTIVATING A FILING AGENT

Step 1. A filing agent no longer associated with an attorney or trustee should be deactivated to ensure security.

- ☐ Access your person record using **Utilities/ Maintain Your ECF Account**. Click **More user information**.
- ☐ Uncheck the box immediately to the left of the filing agent's name to deactivate the association.
- ☐ Click **Return to Account screen**.
- ☐ Click **Submit**
- ☐ Click **Submit** again.

NOTE: Deactivation of the association of a filing agent from an attorney or trustee does not delete the filing agent from the ECF database. Only the association between the filing agent and attorney or trustee is removed. The filing agent may still be associated with another attorney or trustee.

STEP 2. View the identity of any filing agents previously associated with your account.

- ☐ Access your person record using **Utilities/ Maintain Your ECF Account**. Click **More user information**.
- ☐ In the Filing Agents field, click the **Agents previously removed from this account** hyperlink.

ASSOCIATING AGENT'S E-MAIL ADDRESS WITH ATTORNEY OR TRUSTEE RECORD

STEP 1. If you want to enable the filing agent to receive notices of electronic filing [NEF], the filing agent's email address must be listed in your email information in the User Account as a secondary address.

- ☐ Access your person record using **Utilities/Maintain Your ECF Account**, and then click **Email information**.
- ☐ In the text box immediately adjacent to **Secondary email address**, enter the email address(es) desired. Separate multiple addresses with a comma.
- ☐ In the text box immediately adjacent to **Reenter secondary email address**, enter the email address(es) again. The system will require the text boxes to match.